

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

17 JUN 29 PM 5: 32

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The original *Employee Pre-Travel Authorization* (Form RE-1), AND
- ☒ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Postsecondary National Policy Institute (PNPI)

Private Sponsor(s) (list all):

Travel date(s): May 31-June 1, 2017

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate		\$117	\$91	N/A
<input checked="" type="checkbox"/> Actual Amount	\$0			

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	N/A	N/A	N/A	N/A
<input type="checkbox"/> Actual Amount				

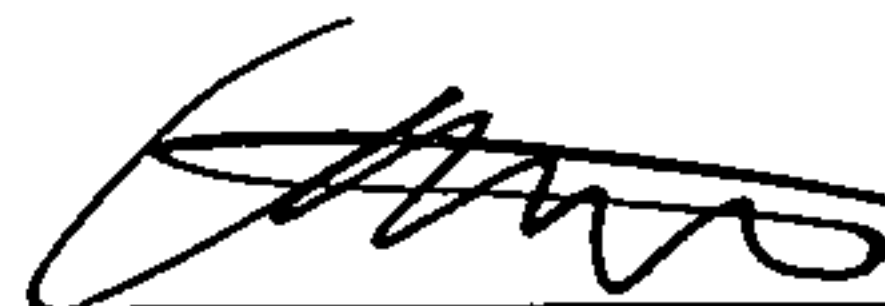
Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Attended a seminar on federal student aid. See attached agenda for additional information.

06/29/17

(Date)

Manuel Contreras

(Printed name of traveler)



(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

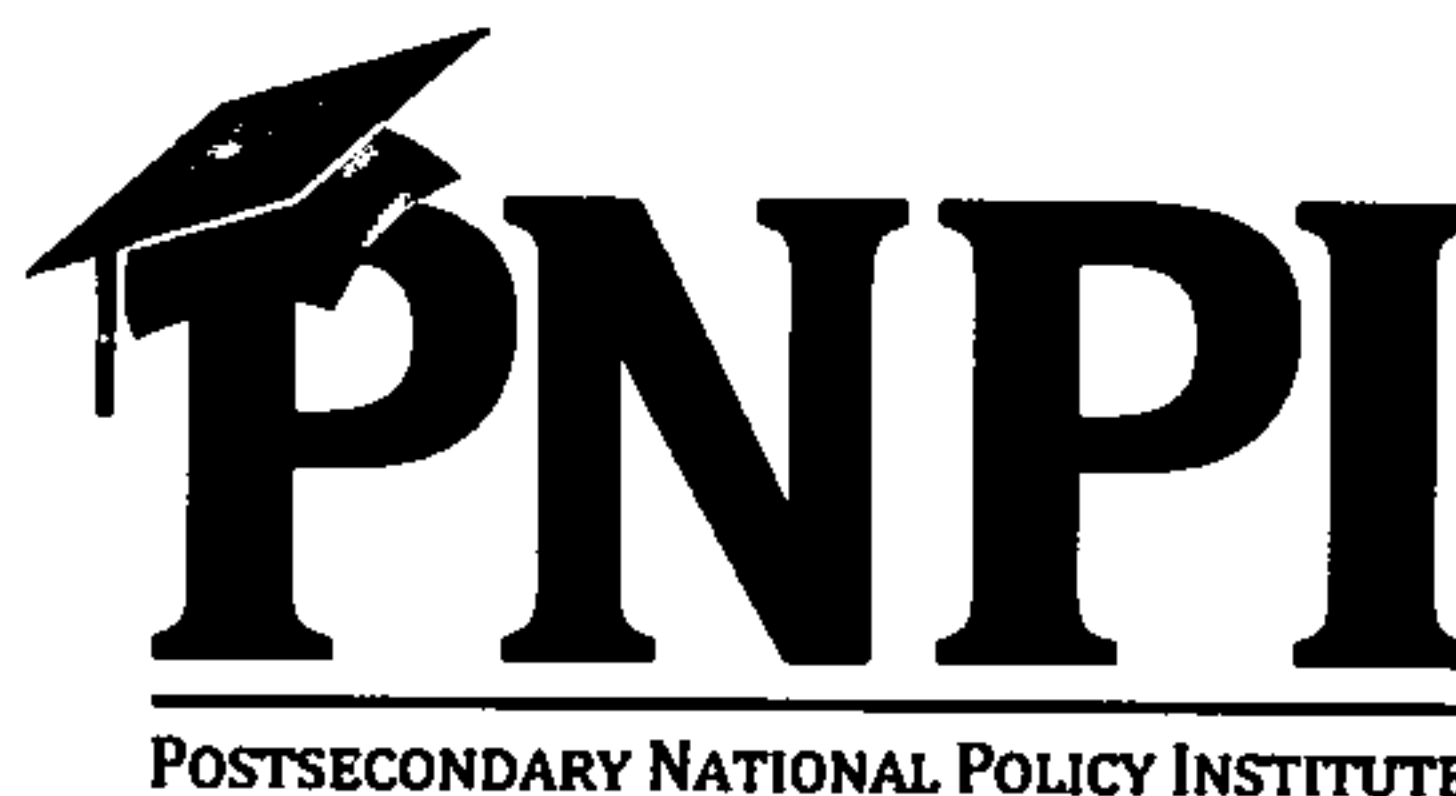
I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

06/29/17

(Date)



(Signature of Supervising Senator/Officer)



Federal Student Aid Boot Camp

Wednesday, May 31 - Thursday, June 1

Kent Manor Inn

Stevensville, MD

SEMINAR GOALS

Increase participants' understanding of how federal student aid programs work, whom they serve and the impact they have on access and completion;

Provide participants with an understanding of how the Free Application for Federal Student Aid (FAFSA) works and the impact of simplification;

Gain insight from former federal policymakers on why particular student loan policies were passed and the extent to which these policies reached their intended full potential;

Deepen participants' understanding of student loan borrowing patterns and student loan debt;

Increase participants' understanding of federal student aid repayment programs; and,

Deepen participants' understanding of the role loan servicers play in the federal Direct Loan system and their work as it relates to regular in school, repayment and pre-default servicing.

AGENDA

Wednesday, May 31

10:00AM Arrive at Kent Manor Inn

10:15AM-11:30AM Welcome & The Pell Grant

Speakers: MaryEllen McGuire, President, Postsecondary National Policy Institute (PNPI)
Ben Miller, Senior Director for Postsecondary Education, Center for American Progress (CAP)

Questions for Discussion:

- What is the Pell Grant and how is the program structured?
What are the current characteristics of Pell Grant recipients?
- What impact have Pell Grants had on access and completion?
What changes to Pell over the past 10 years have had the most impact?

11:30AM-11:45AM Break

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11:45AM-1:00PM Federal Student Loans & Campus Based Aid

Speaker: *Matt Soldner, Principal Researcher, American Institutes for Research (AIR)*

Questions for Discussion:

- *What are the different federal loan programs and how do they work?*
- *What are the eligibility requirements for the federal loan programs?*
What types of students take out student loans (demographic, financial and attendance profile)?
What is campus-based aid? How is campus-based aid paid for?
- *Who is eligible for campus-based aid (institutions/students) and how is it allocated?*
What do we know about the impact of federal student aid on student access, completion and retention?
To what extent do impacts differ based on a student's demographic, financial and attendance profile (FT/PT)?

1:00PM-2:00PM Working Lunch with Experts

Lunch will provide an opportunity for staff to ask our federal student aid panelists additional questions in a smaller group setting.

2:00PM-3:15PM Applying for Financial Aid: FAFSA & The EFC

Speaker: *Sandy Baum, Senior Fellow, Urban Institute*

Questions for Discussion:

What is the FAFSA? Why was it created? How does it work?
How is EFC calculated?
How has FAFSA been simplified over the last few years? Could the FAFSA be further simplified?

3:15PM-3:30PM Break

3:30PM-5:00PM Film Viewing "Looking Back to Move Forward: A History of Federal Student Aid" & Panel Discussion with Former Federal Policymakers

Film: In this short documentary, former policy makers and education researchers provide insight into the evolution of federal student aid through their first-hand experiences with the policy making process.

Speakers: *Gabriella Gomez, Deputy Director of Postsecondary Policy and Advocacy, the Bill & Melinda Gates Foundation and Former House Committee on Education and the Workforce staffer*
James Bergeron, President, National Council of Higher Education Resources (NCHER) and Former House Committee on Education and the Workforce staffer
Beth Buehlmann, Vice President of Public Policy and Government Affairs, Council of Graduate Schools and Former Senate Health, Education, Labor and Pensions (HELP) Committee staffer

Questions for Discussion:

What reflections can you share with the group regarding your role in the creation or expansion of the federal student loan programs?
From your perspective, did the policies passed during your tenure reach their intended or full potential? Why or why not?
What did your involvement on the Hill teach you about federal higher education policy?

5:00PM-5:30PM **Break & Check-In**

5:30PM-7:00PM **Dinner & Day One Wrap-Up/Day Two Preview**

Facilitators: *MaryEllen McGuire, President, PNPI*

Jared Bass, Federal Director, PNPI

Over dinner, PNPI staff will provide an overview of what was covered during the first day of the seminar and determine if participating Congressional staff have any outstanding questions on federal student aid. PNPI staff will also provide a preview of the panels for the second day of programming, with an emphasis on exploring what staff know, don't know, and would like to know about student debt and federal student loan repayment.

Thursday, June 1

8:00AM-9:00AM **Breakfast & Check-out**

9:00AM-10:30AM **Welcome Back & Debt Primer**

Speaker: *Matt Chingos, Senior Fellow, Urban Institute*

Questions for Discussion:

How much are students and families borrowing to attend college? How has this changed over time?

Who is borrowing and what institutions are they attending?

- *What do we know about private student loan borrowing and credit card debt?
How does an individual's economic background, college major, type of institution, amount borrowed and post-graduation income impact their likelihood of repayment or default?*
- *What do we know about student loan delinquency? What types of borrowers are delinquent on student loans?
Why has student debt increased over the last two decades?*

10:30AM-10:40AM **Break**

10:40AM-12:00PM **Federal Repayment Programs**

Speaker: *Alex Holt, Independent Consultant*

Questions for Discussion:

What are the current federal repayment plans?

What is the frequency with which the various plans are used (percentage and number of borrowers)?

What are the characteristics of the borrowers under each plan (including level of debt)?

- *What are the strengths and weaknesses of each repayment plan?
What is deferment and forbearance? Do borrowers understand these options?
How well do borrowers understand the repayment plans available to them? How are they likely to learn about them?*

12:00PM-1:00PM **Working Lunch with Experts**

Lunch will provide an opportunity for staff to ask our federal student aid panelists additional questions in a smaller group setting.

1:00PM-1:10PM **Break**

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1:10PM-2:25PM

Loan Servicing

Speaker: *Colleen Campbell, Associate Director for Postsecondary Education, Center for American Progress (CAP)*

Questions for Discussion:

- *What is federal student loan servicing?
Who are the current federal student loan servicers under the Direct Loan (DL) program and how were they selected? What is the scope of their work?
What are the current roles/responsibilities of the DL servicers (i.e., regular in school and repayment servicing, pre-default servicing)?
How does the U.S. Department of Education (ED) assign DLs to servicers?*
- *What performance metrics does ED use to evaluate the DL servicers? What is performance-based compensation?
What are the interactions between DL servicers and financial aid departments at institutions of higher education?*

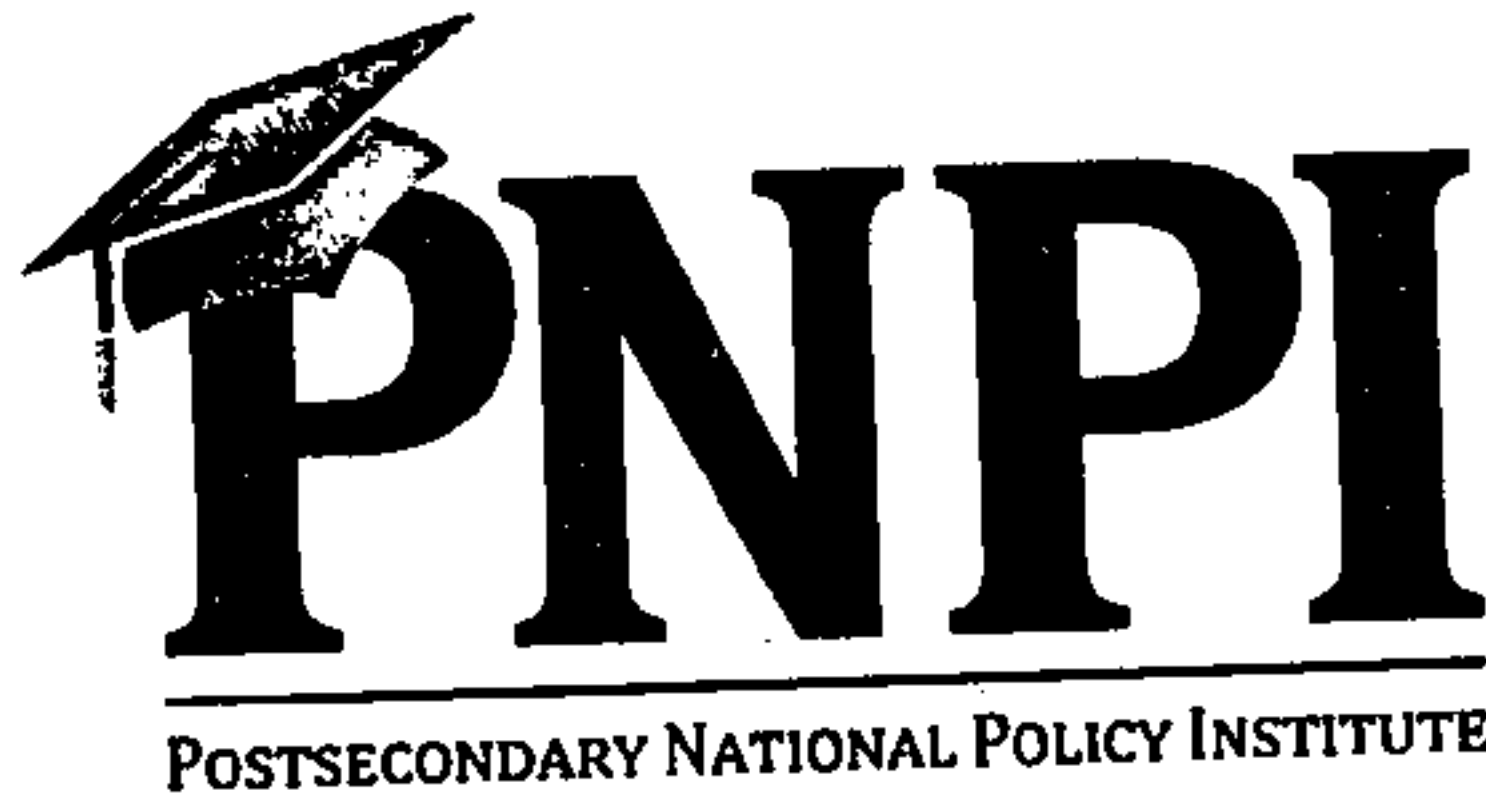
2:25PM-2:35PM

Break

2:35PM-3:30PM

Wrap Up & Adjourn

- *What have you learned about federal student aid policy that surprised you?
What further questions do you have regarding federal student aid?*
- *What more would you like to learn?*



April 24, 2017

Dear Manuel Contreras,

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) Federal Student Aid (FSA) Bootcamp, May 31- June 1, 2017 in Stevensville, MD.

This seminar is designed to introduce staff to how federal student aid programs work, whom they serve and the impact they have on access and completion. Participants will gain insight from former federal policymakers on why particular student loan policies were passed and the extent to which these policies reached their intended, full potential. The seminar will also deepen participants' understanding of student loan borrowing patterns, student loan debt, the federal student aid repayment programs and student loan servicing.

PNPI fully complies both with the rules enacted by the United States Senate and with the provisions contained in S.1 (P.L. 110-81) as they relate to privately-funded travel of Congressional staff. Included with this invitation are all the forms necessary for Ethics rules compliance.

By Monday, May 1, 2017, you must submit the following forms and documents directly with the Ethics Committee in Hart 220:

- A copy of this PNPI invitation;
- A completed Private Sponsor Travel Certification Form with all attachments, including a Senate invitee list;
- An itinerary and agenda; and
- A completed and signed Employee Pre-Travel Authorization Form.

After receiving the completed travel package, the Ethics Committee will review the package and issue an approval for travel to you or your sponsoring Member. The Ethics Committee advises all Senate employees to maintain copies of all submitted forms for their own records. After the seminar, we will provide you with a post-travel form that you will need to complete and submit to the Ethics Committee.

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Even if you are unsure you will be able to attend the seminar, please submit the paperwork so you will have the option to participate. **Paperwork submitted to the Ethics Committee after the deadline will not be considered.** For planning purposes, **PNPI must receive your RSVP no later than April 28.** Please send your RSVP directly to Jared Bass at bass@pnpi.org.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations. No government, individual, foreign, corporate or special interest money is accepted. The foundations supporting PNPI are the Bill and Melinda Gates Foundation and the Lumina Foundation. PNPI maintains autonomy over the agenda, invitations and materials provided before and after the seminar.


The program will begin at the Kent Manor Inn in Stevensville, MD on Wednesday, May 31 at 10:00 AM and conclude at 3:30 PM on Thursday, June 1. If you have any questions about the seminar, please do not hesitate to email or call us directly.

PNPI's seminar on Federal Student Aid promises to be both educational and productive. We look forward to your participation!

Sincerely,



MaryEllen McGuire, President
Postsecondary National Policy Institute (PNPI)
mcguire@pnpi.org
202-841-7359



Jared Bass, Federal Director
Postsecondary National Policy Institute (PNPI)
bass@pnpi.org
215-285-8347

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Postsecondary National Policy Institute (PNPI)
2. Description of the trip: See attached.
3. Dates of travel: May 31-June 1, 2017
4. Place of travel: Stevensville, MD
5. Name and title of Senate invitees: See attached.
6. I *certify* that the trip fits one of the following categories:
- ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
- OR-
- ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- AND -
- ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
- AND -
- ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

— OR —

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

— OR —

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

PNPI has created the agenda, developed the Invitation list, and is managing all event logistics.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attached.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attached.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to multi-day seminars, PNPI sponsors Hill-based briefings for large Hill audiences and is available to all Congressional staff for postsecondary related research support. Our website offers resources including summaries of recent postsecondary reports and primers on higher education issues.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$48.36 (Calculated using Google Maps from U.S. Capitol - round trip.)	\$117	\$91	N/A

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip is arranged and organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Kent Manor is located approximately 60 miles east of DC providing convenient access for congressional staff. In addition to meeting space, this location offers on-site accommodations.

19. Name and location of hotel or other lodging facility:

Kent Manor, 500 Kent Manor Drive, Kent Island, Stevensville, MD 21666

20. Reason(s) for selecting hotel or other lodging facility:

The facility provides both meeting space and overnight lodgings on-site.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging for congressional staff costs \$117/night, the federal per diem. Meal costs are \$53 on day one (lunch, dinner, incidentals) and \$38 on day two (breakfast, lunch, incidentals), both rates are at the federal per diem rate.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

The staff will drive their personal vehicles to the seminar location.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel/sponsor.):

Signature of Travel Sponsor:

Name and Title: MaryEllen McGuire, President

Name of Organization: Postsecondary National Policy Institute (PNPI)

Address: 718 7th Street NW, Floor 2, Washington, DC 20001

Telephone Number: 202-841-7359

Fax Number:

E-mail Address: mcguire@pnpi.org

ATTACHMENT:

Senate Private Sponsor Travel Certification Form

2. Description of the Trip:

PNPI provides professional development to Congressional staff who work on higher education issues. This seminar is designed to introduce staff to, and extend their knowledge of, how federal student aid programs work, whom they serve and the impact they have on access and completion. Participants will gain insight from former federal policymakers on why particular student loan policies were passed and the extent to which these policies reached their intended full potential. The seminar will also deepen participants' understanding of student loan borrowing patterns, student loan debt, the federal student aid repayment programs and student loan servicing.

A detailed agenda is attached.

5. Name and title of Senate invitees:

Manuel Contreras
Legislative Aide
Senate HELP Committee

Nancy Martinez
Legislative Assistant
Senator Young

Will Holloway
Deputy Legislative Assistant
Senator Scott

Karishma Merchant
Legislative Assistant
Senator Kaine

Shannon Hossinger
Legislative Fellow
Senator Hatch

Brittany Weaver
Legislative Assistant
Senator Hassan

All staff were invited due to their employment with a Member who sits on the Senate HELP Committee.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

PNPI provides professional development to Congressional staff who work on higher education issues. This seminar is designed to introduce staff to, and extend their knowledge of, how federal student aid programs work, whom they serve and the impact they have on access and completion. Participants will gain insight from former federal policymakers on why particular student loan policies were passed and the extent to which these policies reached their intended full potential. The seminar will deepen participants' understanding of student loan borrowing patterns, student loan debt, the federal student aid repayment programs and student loan servicing.

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A detailed agenda is attached.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

PNPI has sponsored fifteen prior seminars on the topics of college cost (held in Towson, Maryland in May 2012), student financial aid (held at New America and George Mason University in August 2012, the George Washington University in August 2013, the University of Virginia in August 2014 and the Kent Manor Inn in Stevensville, MD in May 2015), higher education accreditation (held in Owings Mills, Maryland in January 2013 and in Warrenton, VA in March 2016), competency-based education and prior learning assessment (held in Manchester, New Hampshire in May 2013), MOOCs and online learning (held at the Airlie Center in Warrenton, VA in April 2014), Minority-Serving Institutions (held in Atlanta, GA in October 2014 and in Seattle, WA in October 2015), non-traditional students (held at the Kent Manor Inn in Stevensville, MD in August 2015), loan servicing (held in Harrisburg, PA in August 2016), and federal postsecondary data (held at Airlie Center in Warrenton, VA in April 2017). PNPI also sponsored a general issues Boot Camp (held at Kent Manor in Stevensville, MD in June 2016). All prior PNPI trips have been approved by the Ethics Committee.



POSTSECONDARY NATIONAL POLICY INSTITUTE

Federal Student Aid (FSA) Bootcamp

Wednesday, May 31 - Thursday, June 1

Kent Manor Inn
Stevensville, MD

SEMINAR GOALS

- Increase participants' understanding of how federal student aid programs work, whom they serve and the impact they have on access and completion;
Provide participants with an understanding of how the Free Application for Federal Student Aid (FAFSA) works and the impact of simplification;
Gain insight from former federal policymakers on why particular student loan policies were passed and the extent to which these policies reached their intended full potential;
Deepen participants' understanding of student loan borrowing patterns and student loan debt;
Increase participants' understanding of federal student aid repayment programs; and,
Deepen participants' understanding of the role loan servicers play in the federal Direct Loan system and their work as it relates to regular in school, repayment and pre-default servicing.

AGENDA

Wednesday, May 31

10:00AM

Arrive at Kent Manor Inn

10:15AM-11:30AM

Welcome & The Pell Grant

Speakers:

MaryEllen McGuire, President, Postsecondary National Policy Institute (PNPI)
Ben Miller, Senior Director for Postsecondary Education, Center for American Progress (CAP)

Questions for Discussion:

- *What is the Pell Grant and how is the program structured?*
What are the current characteristics of Pell Grant recipients?
What impact have Pell Grants had on access and completion?
What changes to Pell over the past 10 years have had the most impact?

11:30AM-11:45AM

Break

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11:45AM-1:00PM **Federal Student Loans & Campus Based Aid**
Speaker: *Matt Soldner, Principal Researcher, American Institutes for Research (AIR)*

Questions for Discussion:

- *What are the different federal loan programs and how do they work?*
What are the eligibility requirements for the federal loan programs?
What types of students take out student loans (demographic, financial and attendance profile)?
What is campus-based aid? How is campus-based aid paid for?
- *Who is eligible for campus-based aid (institutions/students) and how is it allocated?*
What do we know about the impact of federal student aid on student access, completion and retention?
To what extent do impacts differ based on a student's demographic, financial and attendance profile (FT/PT)?

1:00PM-2:00PM **Working Lunch with Experts**
Lunch will provide an opportunity for staff to ask our federal student aid panelists additional questions in a smaller group setting.

2:00PM-3:15PM **Applying for Financial Aid: FAFSA & The EFC**
Speaker: *Sandy Baum, Senior Fellow, Urban Institute*

Questions for Discussion:

- *What is the FAFSA? Why was it created? How does it work?*
- *How is EFC calculated?*
How has FAFSA been simplified over the last few years? Could the FAFSA be further simplified?

3:15PM-3:30PM **Break**

3:30PM-5:00PM **Film Viewing & Panel Discussion with Former Federal Policymakers**

Speakers: *Gabriella Gomez, Deputy Director of Postsecondary Policy and Advocacy, the Bill & Melinda Gates Foundation and Former House Committee on Education and the Workforce staffer;*
James Bergeron, President, National Council of Higher Education Resources (NCHER) and Former House Committee on Education and the Workforce staffer;
Beth Buehlmann, Vice President of Public Policy and Government Affairs and Former Senate Health, Education, Labor and Pensions (HELP) Committee staffer.

Questions for Discussion:

- What reflections can you share with the group regarding your role in the creation or expansion of the federal student loan programs?*
From your perspective, did the policies passed during your tenure reach their intended or full potential? Why or why not?
What did your involvement on the Hill teach you about federal higher education policy?

5:00PM-5:30PM **Break & Check-In**

5:30PM-7:00PM **Dinner & Day One Wrap-Up/Day Two Preview**

Facilitators: *MaryEllen McGuire, President, PNPI*
 Jared Bass, Federal Director, PNPI

Over dinner, PNPI staff will provide an overview of what was covered during the first day of the seminar and determine if participating Congressional staff have any outstanding questions on federal student aid. PNPI staff will also provide a preview of the panels for the second day of programming, with an emphasis on exploring what staff know, don't know, and would like to know about student debt and federal student loan repayment.

Thursday, June 1

8:00AM-9:00AM **Breakfast & Check-out**

9:00AM-10:30AM **Welcome Back & Debt Primer**

Speaker: *Matt Chingos, Senior Fellow, Urban Institute*

Questions for Discussion:

How much are students and families borrowing to attend college? How has this changed over time?

- *Who is borrowing and what institutions are they attending?*
What do we know about private student loan borrowing and credit card debt?
How does an individual's economic background, college major, type of institution, amount borrowed and post-graduation income impact their likelihood of repayment or default?
What do we know about student loan delinquency? What types of borrowers are delinquent on student loans?
Why has student debt increased over the last two decades?

10:30AM-10:40AM **Break**

10:40AM-12:00PM **Federal Repayment Programs**

Speaker: *Alex Holt, Policy Analyst, Education Policy Program, New America*

Questions for Discussion:

- *What are the current federal repayment plans?*
What is the frequency with which the various plans are used (percentage and number of borrowers)?
What are the characteristics of the borrowers under each plan (including level of debt)?
What are the strengths and weaknesses of each repayment plan?
What is deferment and forbearance? Do borrowers understand these options?
- *How well do borrowers understand the repayment plans available to them? How are they likely to learn about them?*

12:00PM-1:00PM **Working Lunch with Experts**

Lunch will provide an opportunity for staff to ask our federal student aid panelists additional questions in a smaller group setting.

1:00PM-1:10PM **Break**

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1:10PM-2:25PM

Loan Servicing

Speaker: *Colleen Campbell, Senior Policy Analyst, Association of Community College Trustees*

Questions for Discussion:

What is federal student loan servicing?

Who are the current federal student loan servicers under the Direct Loan (DL) program and how were they selected? What is the scope of their work?

- *What are the current roles/responsibilities of the DL servicers (i.e., regular in school and repayment servicing, pre-default servicing)?*

How does the U.S. Department of Education (ED) assign DLs to servicers?

What performance metrics does ED use to evaluate the DL servicers? What is performance-based compensation?

What are the interactions between DL servicers and financial aid departments at institutions of higher education?

2:25PM-2:35PM

Break

2:35PM-3:30PM

Wrap Up & Adjourn

What have you learned about federal student aid policy that surprised you?

What further questions do you have regarding federal student aid?

What more would you like to learn?

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Manuel Contreras

Employing Office/Committee: Senate HELP Committee

Private Sponsor(s) (list all): Postsecondary National Policy Institute (PNPI)

Travel date(s): May 31 - June 1, 2017

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): Stevensville, MD

Explain how this trip is specifically connected to the traveler's official or representational duties:

As a Legislative Aide assisting on postsecondary policy issues, this training will equip me to understanding student borrowing, student loan debt, and sustain aid repayment policy issues better. This introductory bootcamp will deepen my understandings of these issues.

Name of accompanying family member (if any): N/A

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

05/01/17

(Date)

(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Murray hereby authorize Manuel Contreras
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

05/01/17

(Date)

(Signature of Supervising Senator/Officer)

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Federal Student Aid Boot Camp

Wednesday, May 31 - Thursday, June 1

Kent Manor Inn

Stevensville, MD

SEMINAR GOALS

Increase participants' understanding of how federal student aid programs work, whom they serve and the impact they have on access and completion;

- Provide participants with an understanding of how the Free Application for Federal Student Aid (FAFSA) works and the impact of simplification;

Gain insight from former federal policymakers on why particular student loan policies were passed and the extent to which these policies reached their intended full potential;

Deepen participants' understanding of student loan borrowing patterns and student loan debt;

Increase participants' understanding of federal student aid repayment programs; and,

Deepen participants' understanding of the role loan servicers play in the federal Direct Loan system and their work as it relates to regular in school, repayment and pre-default servicing.

AGENDA

Wednesday, May 31

10:00AM Arrive at Kent Manor Inn

10:15AM-11:30AM Welcome & The Pell Grant

Speakers: MaryEllen McGuire, President, Postsecondary National Policy Institute (PNPI)
Ben Miller, Senior Director for Postsecondary Education, Center for American Progress (CAP)

Questions for Discussion:

What is the Pell Grant and how is the program structured?

What are the current characteristics of Pell Grant recipients?

What impact have Pell Grants had on access and completion?

What changes to Pell over the past 10 years have had the most impact?

11:30AM-11:45AM Break

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11:45AM-1:00PM

Federal Student Loans & Campus Based Aid

Speaker: *Matt Soldner, Principal Researcher, American Institutes for Research (AIR)*

Questions for Discussion:

What are the different federal loan programs and how do they work?

What are the eligibility requirements for the federal loan programs?

What types of students take out student loans (demographic, financial and attendance profile)?

What is campus-based aid? How is campus-based aid paid for?

Who is eligible for campus-based aid (institutions/students) and how is it allocated?

What do we know about the impact of federal student aid on student access, completion and retention?

To what extent do impacts differ based on a student's demographic, financial and attendance profile (FT/PT)?

1:00PM-2:00PM

Working Lunch with Experts

Lunch will provide an opportunity for staff to ask our federal student aid panelists additional questions in a smaller group setting.

2:00PM-3:15PM

Applying for Financial Aid: FAFSA & The EFC

Speaker: *Sandy Baum, Senior Fellow, Urban Institute*

Questions for Discussion:

What is the FAFSA? Why was it created? How does it work?

How is EFC calculated?

How has FAFSA been simplified over the last few years? Could the FAFSA be further simplified?

3:15PM-3:30PM

Break

3:30PM-5:00PM

Film Viewing "Looking Back to Move Forward: A History of Federal Student Aid" & Panel Discussion with Former Federal Policymakers

Film: *In this short documentary, former policy makers and education researchers provide insight into the evolution of federal student aid through their first-hand experiences with the policy making process.*

Speakers: *Gabriella Gomez, Deputy Director of Postsecondary Policy and Advocacy, the Bill & Melinda Gates Foundation and Former House Committee on Education and the Workforce staffer*
James Bergeron, President, National Council of Higher Education Resources (NCHER) and Former House Committee on Education and the Workforce staffer
Beth Buehlmann, Vice President of Public Policy and Government Affairs, Council of Graduate Schools and Former Senate Health, Education, Labor and Pensions (HELP) Committee staffer

Questions for Discussion:

What reflections can you share with the group regarding your role in the creation or expansion of the federal student loan programs?

From your perspective, did the policies passed during your tenure reach their intended or full potential? Why or why not?

What did your involvement on the Hill teach you about federal higher education policy?

5:00PM-5:30PM

Break & Check-In

5:30PM-7:00PM

Dinner & Day One Wrap-Up/Day Two Preview

Facilitators: MaryEllen McGuire, President, PNPI

Jared Bass, Federal Director, PNPI

Over dinner, PNPI staff will provide an overview of what was covered during the first day of the seminar and determine if participating Congressional staff have any outstanding questions on federal student aid. PNPI staff will also provide a preview of the panels for the second day of programming, with an emphasis on exploring what staff know, don't know, and would like to know about student debt and federal student loan repayment.

Thursday, June 1

8:00AM-9:00AM

Breakfast & Check-out

9:00AM-10:30AM

Welcome Back & Debt Primer

Speaker: Matt Chingos, Senior Fellow, Urban Institute

Questions for Discussion:

How much are students and families borrowing to attend college? How has this changed over time?

- *Who is borrowing and what institutions are they attending?*

What do we know about private student loan borrowing and credit card debt?

How does an individual's economic background, college major, type of institution, amount borrowed and post-graduation income impact their likelihood of repayment or default?

What do we know about student loan delinquency? What types of borrowers are delinquent on student loans?

Why has student debt increased over the last two decades?

10:30AM-10:40AM

Break

10:40AM-12:00PM

Federal Repayment Programs

Speaker: Alex Holt, Independent Consultant

Questions for Discussion:

- *What are the current federal repayment plans?*

What is the frequency with which the various plans are used (percentage and number of borrowers)?

What are the characteristics of the borrowers under each plan (including level of debt)?

What are the strengths and weaknesses of each repayment plan?

What is deferment and forbearance? Do borrowers understand these options?

How well do borrowers understand the repayment plans available to them? How are they likely to learn about them?

12:00PM-1:00PM

Working Lunch with Experts

Lunch will provide an opportunity for staff to ask our federal student aid panelists additional questions in a smaller group setting.

1:00PM-1:10PM

Break

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1:10PM-2:25PM

Loan Servicing

Speaker: *Colleen Campbell, Associate Director for Postsecondary Education, Center for American Progress (CAP)*

Questions for Discussion:

What is federal student loan servicing?

Who are the current federal student loan servicers under the Direct Loan (DL) program and how were they selected? What is the scope of their work?

What are the current roles/responsibilities of the DL servicers (i.e., regular in school and repayment servicing, pre-default servicing)?

How does the U.S. Department of Education (ED) assign DLs to servicers?

What performance metrics does ED use to evaluate the DL servicers? What is performance-based compensation?

What are the interactions between DL servicers and financial aid departments at institutions of higher education?

2:25PM-2:35PM

Break

2:35PM-3:30PM

Wrap Up & Adjourn

What have you learned about federal student aid policy that surprised you?

What further questions do you have regarding federal student aid?

What more would you like to learn?